

**DRAFT DIRECTIVE TRANSMITTAL**  
**WORKFORCE INVESTMENT ACT**

Number: WIADD-140

Date: April 6, 2007

TO: WORKFORCE DEVELOPMENT COMMUNITY

SUBJECT: ORGANIZATIONAL INFORMATION CHANGES

☒ **IMMEDIATE ACTION**

Bring this draft to the attention of the appropriate staff.

☒ **E-MAIL COPY TRANSMITTED**

Number of pages (including coversheet): 7

If there are any problems with this transmittal, please call the Pagemaster at 916/654-8008.

**SUBJECT MATTER HIGHLIGHTS:**

Please review and comment on the attached draft directive.

This draft directive will supersede WIA Directive WIAD06-1, dated July 18, 2006.  
The revisions to this directive are viewed as **highlighted text**.

**COMMENTS ARE DUE BY:**

**4/20/07**

Comments can be submitted through one of the following ways:

- 1) **Fax** — WSD, Attention: **Martha Overman** at 916/654-9119
- 2) **E-Mail** — [moverman@edd.ca.gov](mailto:moverman@edd.ca.gov) (Include "draft comments" in the subject line)
- 3) **Mail** — WSD / P.O. Box 826880 / MIC 69 / Sacramento, CA 94280-0001

All comments received by the end of the comment period will be considered before the final directive is issued. However, we will not be able to individually respond to comments. **Comments received after the specified due date will not be considered.**

If you have any questions, contact your WSD Regional Advisor at (916) 654-7799.

# DRAFT DIRECTIVE

## WORKFORCE INVESTMENT ACT

Number:

Date:

69:130:me:10631

TO: WORKFORCE DEVELOPMENT COMMUNITY

SUBJECT: ORGANIZATIONAL INFORMATION CHANGE

### EXECUTIVE SUMMARY:

#### Purpose:

This directive provides guidance to all recipients of Workforce Investment Act (WIA) funding that make a change to their organizational information.

#### Scope:

This directive requires that any recipient of WIA funds must provide documentation for organizational changes to a central point of contact within the Workforce Services Division (WSD).

#### Effective Date:

This directive is effective immediately

#### REFERENCES:

None

#### STATE-IMPOSED REQUIREMENTS:

This draft directive contains some State-imposed requirements that are shown in ***bold, italic*** type. State instructions provide the process for submittal for all organizational changes.

#### FILING INSTRUCTIONS:

This directive supersedes WIA Directive WIAD06-1, dated July 18, 2006. Retain this directive until further notice.

## **BACKGROUND:**

The subgrant is the vehicle by which the State provides funding to all recipients. In turn, the recipients are responsible for ensuring the State has the most current information for each of their organizations. Having the most current information enables the State to execute contracts, disseminate information and disburse funds with the least amount of delay. In the past, the Workforce Services Division (WSD) has received requests to update or change organizational information through various channels, this method created problems in maintaining accuracy in databases used for dissemination of information. To eliminate those problems, we are establishing a single point of contact within WSD to be responsible for reviewing and processing any organizational change submitted by any funding recipient.

## **POLICY AND PROCEDURES:**

*All recipients of WIA funds must provide the name and e-mail address of an Administrator Alternate and must submit all changes to their organizational information to the WSD Financial Management Unit. Organizational changes have been divided into two types.*

### **Type 1 Changes:**

*Organizational changes for the following must be submitted on official letterhead stationary and must be signed by the appropriate Chief Elected Official, Chief Administrator, or Chief Executive Officer representing the organization. These changes will be accepted in hard copy by U.S. mail only.*

- Local Workforce Investment Area (LWIA) and Community Based Organization (CBO) Subgrantee name changes.
- LWIA and CBO Subgrantee Administrator, Administrator Alternate, Local Workforce Investment Board Chair, Chief Elected Official/Executive name change and any changes to office telephone/e-mail/fax numbers for the above parties.
- LWIA and CBO site and mailing address changes.

### **Type 2 Changes:**

*Organizational changes for the following must be submitted by one of the parties affected by the change or the designated representative for the organization. These changes will be accepted by e-mail or fax.*

- Management Information System (MIS) Administrator and/or Alternate name, address, telephone, e-mail or fax number changes.
- Fiscal Administrator and/or Alternate name, address, telephone, e-mail or fax number changes.
- Rapid Response Coordinator name, address, telephone, e-mail or fax number changes.

**For changes in a LWIA's Equal Opportunity Office, refer to the Workforce Investment Act Directive WIAD01-21, *Nondiscrimination and Equal Opportunity Procedures*, dated June 25, 2002.**

The attached Subgrantee Information Change Forms are optional and may be used to request either type of organizational changes. **These forms are linked as attachments to this directive.**

Documentation for Type 1 Changes will be accepted by mail only and must be accompanied by officially signed letterhead. When using the Type 1 Change form, only the areas where changes have occurred need to be completed. Submission for Type 1 Changes are to be mailed to:

Attn: Contracts Analyst  
Financial Management Unit, MIC 69  
Workforce Services Division  
Employment Development Department  
P.O. Box 826880  
Sacramento, CA 94280-0001

Type 2 Changes may be mailed to the address stated above or submitted by fax to the Financial Management Unit, Attn. Contracts Analyst at (916) 654-9119 or by e-mail to Martha Overman at [moverman@edd.ca.gov](mailto:moverman@edd.ca.gov). Although only the areas on the form where changes have occurred need to be completed, the entity name **must** be completed.

### **WSD Publications**

Directives, information bulletins, and other workforce information are posted on EDD's Web site. The WSD disseminates these documents to the Workforce Development Community through an e-mail subscription service. When new information **is** posted on the Internet, the WSD pagemaster e-mails a "Workforce Development New Web Item" notification to the Workforce Development Community. To automatically receive this notification **service** subscribe at [www.edd.ca.gov/listmain.htm](http://www.edd.ca.gov/listmain.htm).

Using the e-mail subscription address referenced above to change an e-mail address, first unsubscribe the old e-mail address and then subscribe to the new e-mail address. To delete an e-mail address **only**, just unsubscribe. **These changes** will affect the e-mail subscription service that notifies the Workforce Development Community.

### **ACTION:**

Bring this directive to the attention of appropriate staff.

**INQUIRIES:**

Please direct inquiries regarding this directive to the Financial Management Unit at (916) 654-8008.

BOB HERMSMEIER  
Chief  
Workforce Services Division

Attachments

## Subgrantee Information Change Form – Type 1

LWIA ☐

Non-LWIA ☐

<b>Entity Name</b>				<b>Entity Site Address</b>	
<b>Entity Internet Address</b>				<b>Entity Mailing Address</b>	
<b>Entity Director/Administrator</b>					
Salutation	First	MI	Last	Title	
<b>Address</b>					
<b>Phone</b>		<b>Fax</b>		<b>E-Mail Address</b>	

<b>Entity Director/Administrator Alternate</b>					
Salutation	First	MI	Last	Title	
<b>Address</b>					
<b>Phone</b>		<b>Fax</b>		<b>E-Mail Address</b>	

<b>LWIA Only:</b>					
<b>Local Workforce Investment Board Chair</b>					
Salutation	First	MI	Last	Title	
<b>Board Name</b>					
<b>Address</b>					
<b>Phone</b>		<b>Fax</b>		<b>E-Mail Address</b>	

<b>Chief Elected Official</b>					
Salutation	First	MI	Last	Title	
<b>Organization Name</b>					
<b>Address</b>					
<b>Phone</b>		<b>Fax</b>		<b>E-Mail Address</b>	

Please check applicable entity type:

Government Entity ☐

State Agency ☐

Private Entity ☐

**Signature**

**Date**

[Form in MS Word](#)

## Subgrantee Information Change Form – Type 2

<b>Entity Name (required for database identification)</b>

<b>Management Information System Administrator</b>				
Salutation	First	MI	Last	Title
Address				
Phone	Fax	E-Mail Address		

<b>Management Information System Alternate</b>				
Salutation	First	MI	Last	Title
Address				
Phone	Fax	E-Mail Address		

<b>Fiscal Administrator</b>				
Salutation	First	MI	Last	Title
Address				
Phone	Fax	E-Mail Address		

<b>Fiscal Administrator Alternate</b>				
Salutation	First	MI	Last	Title
Address				
Phone	Fax	E-Mail Address		

<b>LWIA Only:</b>				
<b>Rapid Response Coordinator</b>				
Salutation	First	MI	Last	Title
Address				
Phone	Fax	E-Mail Address		

[Form in MS Word](#)